

2003 IRS Software Developers Conference Form 1040 Update

Jimmy Smith, IRS Director Submission Processing
Mary Kariotis IRS Chief Individual Electronic Filing
Keith Wallace IRS Chief Data Management

- Jimmy acknowledged that some folks are concerned about relationship changes due to the recent IRS reorganization of e-file responsibilities. He said that IRS is doing all it can to make the process work for our customers
- ? Jimmy said that we had a very good 2003 filing season (52 million returns e-filed, increase of 12%). Online e-filing was up 27% and PIN (alternative “electronic” signature method) usage increased 32%
- ? Jimmy asked that developers devise a solution to prevent V-Coded returns (i.e., computer-generated and mailed, not e-filed) from showing a blank direct deposit field. This will avoid possible fraud
- ? Keith Wallace summarized the improved e-Help Desk operation. The new, single toll-free number for any location was 866-255-0654. This is the first time that a toll-free number has been available. Keith asked meeting participants to call the number that night and report back any problems the next day
- ? Jimmy stressed the importance to IRS of good customer communication. If developers or transmitters are having problems, please use the Help Desk. Another way for IRS to communicate with the community is through “QuickAlerts.” The group was advised to go to the link listed in their program materials and sign up. The service provides processing (and other) updates via FAX, e-mail, or telephone
- ? Mary Kariotis said that the Help Desk goal is to provide consistent service for business or individual tax returns. A tracking system escalates problems, possibly to headquarters, that assistants can’t solve immediately
- ? Keith noted that the Help Desk is revolutionizing customer support, as this one toll-free number is for any e-related problem (e-file, EFTPS, etc). A phone routing system ensures the fastest possible service. Issues received are analyzed and recorded by company using a Customer Relationship Management (CRM) tool. Procedures will be standardized in all service sites. In the future, e-mail and “chat” services are planned
- ? In response to a question about eliminating the Electronic Bulletin Board for e-file information, Mary said that our ultimate plan is to close that service and use the web, QuickAlerts, and the Help Desk
- ? An audience member noted that Pub 1345A (Filing Season Supplement for Authorized ERO’s) distribution was problematic last year and requested that such information be available earlier. Mary acknowledged that printed material delivery is always much slower than using the web. She said that such information is posted on irs.gov sometimes months before mail receipt. Another audience member requested that Publication 1346 (Electronic Returns File Specs & Record Layouts) be available in August

- ? Mary said that PATS testing begins 11/4/03. There will be 36 scenarios, including several intended to test changes as a result of legislative changes. Publication 1436 (Test Package for Electronic Filing of Individual Income Tax Returns) is scheduled to print in October (visit irs.gov for earlier availability)
- ? Mary discussed many changes: new forms to be e-filed, PIN developments, viewing Acknowledgment files (ACK's) to determine that PIN was accepted, eliminating requirement for Form 1099-G, increasing to 20 Form 1099-R occurrences, studying data fields on information documents to eliminate from key entry, suggested changes to identify DECD (deceased) taxpayers, and impact of new tax law (planned reject code for Advance Child Tax Credit payment)
- ? The audience raised several items for consider/evaluate: make another field for DECD (Mary), provide single federal and state EIN process (ETA), solicit stakeholder input before implementing significant changes (All), change requirement that practitioners must retain documents in their offices (ETA), accept multiple extensions in one transmission (Mary), and relax acceptable AGI dollar tolerance range for PIN acceptance (ETA).